

Working with Brokers, Agents & Intermediaries

Intermediary Management & Development from Customer Attuned Ltd

Mark Hollyoake, Alan Thompson & Chris Hudd



www.customerattuned.com
Hello@customerattuned.com

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Introduction

More and more organisations are putting a renewed focus on the intermediary route to market.

There are two main reasons:

1. Organisations with direct channels are coming under ever increasing pressure to compete with an almost singular focus on price making it extremely difficult to deliver shareholder expectations
2. The personal intermediary markets, themselves under pressure from direct writers and affinity brands, aggregators, etc. are looking to compete on value added service and want providers who can support them to compete beyond price
3. The commercial intermediary market is continuing to be extremely price sensitive and needs producers who can combine sharp prices with great customer and intermediary service.

Our Training Programme provides expertise and flexibility.

With over 30 years experience of working in Intermediary Management we have developed a programme which focuses on:

- **Market strategy**
- **Intermediary requirements**
- **Planning and delivery**

Or, in simple terms, **thinking, creating, doing.**

Our training enables organisations to develop a consistent approach within commercial teams. It establishes Intermediary Management as a core commercial competence within the organisation.

We aim to enable you to increase the level of efficiency and effectiveness of your Intermediary relationships via the development of 'good practice' Intermediary Management.

Who is the programme for?

You may be setting up new Intermediary relationships or improving the level of efficiency and effectiveness of existing ones. Our modules offer flexible entry points to match your needs. Whether you are:

- A commercial manager new to Intermediary Management
- An existing Intermediary Manager looking to develop and expand the distributed route to market
- An experienced Intermediary/Commercial Manager
- A newcomer to the world of Intermediary Management



Our approach enables you to:

Reduce the need to change Intermediary(s) or reversion to the contract to resolve performance issues.

Increase the value generating potential from Intermediary based relationships.

Intermediary Management and Development

Develop a recognised 'way' of managing customers through Intermediary relationships.

By the end of this programme you will be able to:

- Establish the expectations the organisation requires the relationship to deliver.
- Develop a process that maps the Intermediary market into segments that you want to manage appropriately and feeds into expectation setting.
- Evaluate existing and new intermediaries and assign into your appropriate management 'bucket'.
- Effectively engage internal key stakeholders on the need for an Intermediary management plan.
- Produce a development plan to close the key Intermediary capability gaps
- Establish 'ways of working' between both parties according to segment.
- Identify the role of a Intermediary manager: what do they do, why and when?
- Develop a launch plan and it implementation
- Undertake a joint business planning process with an Intermediary partner
- Develop a joint business plan with an Intermediary partner

Programme Delivery

We know Intermediary teams tend to be compact either the sole responsibility of one person or a limited number of highly skilled business managers. This is why we have developed a flexible programme of training and support to respond to individual organisation's needs.

Our training is a blended offer of face to face, interactive workshops, one to one coaching and mentoring, supported with on-line/Skype/web learning.

Prior to each programme we discuss your needs in detail to ensure we provide a package which meets your needs.

At the end of each programme participants are required to undertake a post course assessment. This takes the form of a self-assessment using a competency based questionnaire. It provides organisations and individuals with key information about skills, knowledge and competencies within their teams.

Our Team

This Programme will be led by Mark Hollyoake, Alan Thompson and Chris Hudd

Mark Hollyoake is a co-founder and Director of Customer Attuned Ltd. He is currently studying for his Doctorate at Southampton University. He is an expert in B2B Customer Experience and Customer Management. He is a worldwide expert in international Intermediary management and third party management, and is currently co-developing an innovative method capturing and codifying best practice with practitioners from a leading edge FMCG organisation.

Chris Hudd is an experienced trainer/consultant who has previously worked for several of the UK's leading consultancies in the B2B training and consulting space. Focussing in sales, distribution and key account management in the pharma, visioncare, FMCG and industrial/B2B sectors and driving sales through third parties.

Alan Thompson has CM expertise combined with in-depth knowledge of the insurance industry developed over more than 25 years of working in strategy, marketing, CM and technical development roles in Commercial and Personal insurance global markets. He has led programmes across the world to develop customer/broker strategies, manage research programmes, develop customer and broker propositions, account and pipeline management, and customer experience mapping and evaluation. This has been complemented by several years' experience in the

Intermediary Management and Development

design and delivery of training programmes for insurance staff.

Please see www.customerattuned.com for full biographies.

Cost & Timings

Our programmes are designed to flexibly meet individual organisation's needs. For more information on cost and delivery please contact us directly.

About Customer Attuned

Customer Attuned is run by a team of customer management experts with strong experience in the development of innovative customer-driven change in the B2B sector. We passionately believe that the principles that form the basis for successful B2B client relationships are:

**TRUST, INTERDEPENDENCE,
& MUTUAL COMMERCIAL
BENEFIT sit at the heart of
our approach**

We help you to:

- Managing and improving the quality and return from your customer relationships
- Growing your share of existing customers
- Improving organisational efficiency
- Gaining new customers and building profitable relationship

We have a proven track record of co-creating bespoke solutions to enable your CM team to unlock potential and consistently grow market share value/volume.

Our business is founded on three core foundations:

Trust – the oil and enabler of the relationship

Interdependence – how closely do we work together, and rely on each other?

Mutual Commercial Value – is the relationship balanced with both sides mutually benefiting from what they have invested?

These, one could say are the crucible in which all good business practice and development are founded. Good customer relations depend on establishing a set of organisational values which underpin all activities. It enables organisations to work effectively, efficiently. Co-working creates stability, opportunity and drives down costs.

CONTACT: hello@customerattuned.com

